

FRESNO, CALIFORNIA
CLASS SPECIFICATION
RETIREMENT SPECIALIST

FLSA STATUS:

Exempt

CLASS SUMMARY:

The Retirement Counselor is the second level in a two level Retirement Counselor series. Incumbents perform journey level retirement counseling, exercise independent and significant judgment, related to benefits and options, disability retirement, and retiree payroll. Incumbents deal with highly complex and confidential issues, and apply and interpret the provisions of the Fresno Municipal Code and Memoranda of Understanding, and Federal and State pension tax laws.

The Retirement Specialist is distinguished from the Retirement Counselor by its responsibility for performing journey level retirement counseling services to employees.

TYPICAL CLASS ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)

**FRE-
QUENCY**

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|----|---|-----------------|
| 1. | Verifies benefit eligibility and prepares estimates of benefits payable; counsels members and their beneficiaries on benefit options, service purchases, service and disability retirement, Deferred Retirement Option Program (DROP), Post Retirement Supplemental Benefit (PRSB) program, and death benefits. | Daily
50% |
| 2. | Responds to a variety of retirement benefit questions, ranging from routine to complex, for active, deferred, and retired members, explaining various options so members can make informed retirement planning choices. | Daily
20% |
| 3. | Receives, processes, and prepares a variety of forms, documents, and related information related to retirees. | Daily
10% |
| 4. | Prepares and maintains retiree records regarding benefits, insurance, and deductions. | Daily
5% |
| 5. | Prepares presentations and speaks before groups of members to explain benefits. | Bi-Weekly
5% |
| 6. | Researches and compiles data and information associated with retiree benefits and prepares related reports detailing findings and recommendations. | Monthly
10% |
| 7. | Performs other duties of a similar nature or level. | As
Required |

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POSITION SPECIFIC RESPONSIBILITIES MIGHT INCLUDE:

| Depending on assignment, positions may be responsible for:

- Gathering, organizing and processing disability applications;
- Administering domestic relations orders and providing related counseling;
- Implementing system and program changes due to legal rulings, IRS guidelines, changes to the Municipal code, Memorandums of Understanding (MOU), and legal settlements;
- Setting up, maintaining, and adjusting DROP accounts.
- Processing retiree payroll, including refunds;
- Implementing changes to retirees' tax and insurance deductions;
- Setting up and maintaining retirees' and surviving spouses' monthly benefits;
- Processing insurance letters for retirees and/or their spouses upon reaching age 65.

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¶ Positions assigned to Retirement Counseling may be responsible for:

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¶ Positions assigned to Retiree Payroll may be responsible for:¶

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Training and Experience (positions in this class typically require)

- Fifteen semester units of accredited college level course work in Business Administration, Public Administration, or a related field and one year of experience as a City of Fresno Retirement Counselor or equivalent;
- OR
- An equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

Licensing Requirements (positions in this class typically require):

Some positions, based on assignment, may require:

- Valid State of California Driver's License, Class C.

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Knowledge (position requirements at entry):

Knowledge of:

- Pension administration systems;
- Disability processing;
- Death/survivor benefits;
- Applicable Federal, State and Local laws, codes, ordinances, policies, procedures, rules and regulations;
- Research methods;
- Accounting principles, practices and methods;
- Elementary statistics;
- Data collection methods;
- Retirement systems;
- Analytical methods and techniques.

Skills (position requirements at entry):

Skill in:

- Using a computer and related software applications;
- Providing customer service;
- Preparing and maintaining clear, concise, and comprehensive records, reports, and other written documents;
- Preparing and giving clear and concise oral presentations;
- Interpreting, applying, and explaining applicable laws, ordinances, codes, rules, and regulations;
- Applying principles of logic to define problems, analyze data, and evaluate and select from possible alternatives for problem resolution;
- Gathering, compiling, and evaluating research and data and making appropriate recommendations based on findings;
- Administering retirement programs;
- Communication and interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to give and/or receive work direction.

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Physical Requirements:

Positions in this class typically require: feeling, finger dexterity, grasping, hearing, repetitive motions, seeing and talking.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to life, carry, push, pull or otherwise move objects including one's own body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met. Some positions may require more frequent walking, lifting and standing.

Note:

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.

Classification History:

Draft prepared by Fox Lawson & Associates (LM)
Date: 12/2007